

**BACKGROUND SUMMARY:
CALIFORNIA STATEWIDE REFERENCE MODEL**

Prepared for the Library of California Board Meeting, April 18, 2007

By
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Supplement to the slide presentation, “California Statewide Reference:
A Design Proposal”

BACKGROUND SUMMARY
CALIFORNIA STATEWIDE REFERENCE MODEL DESIGN
PROJECT BACKGROUND

This “Background Summary” is a brief companion to the slide presentation, “California Statewide Reference: A Design Proposal.” The slide presentation which includes a proposed design for a California Statewide Reference Model will be the subject of review and discussion at the Library of California Board meeting, April 18, 2007.

For additional background about the project purpose, scope, and methodology, please see the October, 2006 report “Developing a New Reference Model: Scope of Work” on the State Library’s website: <http://www.library.ca.gov/html/lds.cfm>.

This report was also presented to the Library of California Board at its September 14, 2006 meeting. The minutes of that meeting provide a good overview of the presentation as well as the comments and questions from the Board and public. These minutes are slated to be approved at the April 18, 2007 meeting and will soon be on the State Library’s website: <http://www.library.ca.gov/loc/board/minutes/minutes.cfm>

Project Purpose and Scope

In the fall of 2006, State Librarian Susan Hildreth hired Ruth Metz Associates, Portland, Oregon, to develop a new design for statewide reference in California. The project specifications called for the consultant to take a direct and pragmatic approach to designing the new reference model. It further stipulated that the new model should include the following components, building wherever possible on the strengths of the current reference structures in California.

- A “next level of reference” that enables a question that cannot be handled at the local public library to be referred and answered. Presently, questions are referred from a local public library system to its regional reference center. The California Services Act (CLSA) enables state funding for reference services. In FY 2006/07, state funding totaled \$1.3 million and local libraries contributed another \$300,000 for a total of \$1.6 million.
- Virtual reference, 24 hours a day, 7 days a week (24/7). AskNow is currently California’s 24/7 service. This is available directly to the public as a link on the web pages of CA public libraries. The California State Library supports this service on behalf of California libraries with \$200,000 in federal Library Services and Construction Act (LSTA) funding.
- Selected specialized databases to support the question-answering function. The regional CLSA reference centers and AskNow librarians use the Los Angeles Public Library’s *First Source* databases. The California State Library uses LSTA funding to provide this service: \$313,500 in FY 2006/07.

Project Timeline

The project timeline spans August 2006 to June 2007. The consultant's work plan includes four phases: start-up/preparation, fact-finding, design, and ramp up to implementation. The project is in phase 3, design.

Project Methodology

The consultant studied documents and conducted field visits and interviews related to second level reference, virtual reference, and databases. She also interviewed various key informants regarding reference state of the art, best practices, and futures thinking. The *Acknowledgements* section of this Background Summary includes a partial list of individuals consulted.

Major Findings

- The three elements of the current “model”, reference referral, virtual reference, and database support are not working as effectively as anyone wants.
- People in the field understand that the current elements are not functioning well for Californians and they are expecting a change. They are open to a change that offers the promise of improved service and of helping libraries into the next generations of reference and Web services.
- Some say there needs to be a “next level” of reference service, even now as reference is changing. CLSA system key informants tend to believe that local libraries need their services because local staff is ill-equipped to go it alone. Some stakeholders, particularly in better funded libraries, believe that *traditional* reference is ‘dead’ and that 2nd level reference is not the best expenditure of CLSA reference funds.
- Many stakeholders are of the opinion that it is time to replace next level reference with funding subsidies and/or State Library leadership to enable Library 2.0 development.
- There’s universal ambivalence about the viability of virtual reference, the nature of questions, and the technical problems that make virtual reference difficult to use. Many are dissatisfied with AskNow because of its technical difficulties, the dependency on local libraries to provide librarians, and the high percentage of questions of a “call desk” nature.
- Key informants believe that while virtual reference today is far from perfect, web-based services are inevitable, public libraries need to be in the game, and the State Library needs to lead the way.

- A significant amount of money is going into acquiring databases around California at the local, regional, and state levels. Libraries report that the use of databases is discouraging. The data shows scant use of First Source by CLSA systems and AskNow.
- There's no "leaderly" oversight of any of these elements at this crucial time of changing technology and next generation Web service evolution.

Major Conclusions

- Despite any current inadequacies, all three elements should be a part of *the next statewide model*.
- Any successful model is dependent on effective leadership for oversight, coordination, integration, analysis, and development.
- The organizational structure must enable the model to change quickly as needed, adapt to the changing technology, expand and contract, add and take away.
- A better model is possible within the structure of CLSA.
- CLSA funds may be repurposed to do this along with other funds. LSTA funding could supplement the developmental facet of the model along with grants and public/private funding partnerships.

Next Steps

- April/May: Consultant and Client refine design; outline implementation plan
- June: Consultant's Final Design

Acknowledgements

This is a partial list of those who have been consulted in the course of this project. In addition to the administrative and reference staff of CLSA reference centers:

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